

Getting Started

Agreement Builder

Legal Documentation
Software for Small Businesses



Getting Started

Agreement

*Builder*TM

Version 3.0

For WindowsTM and Macintosh[®]



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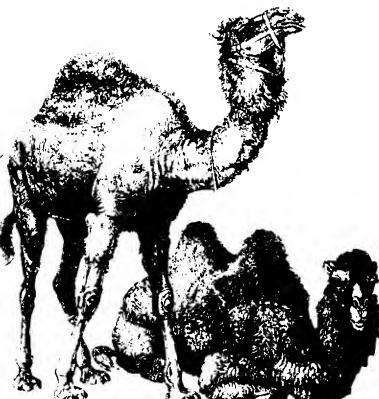
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Welcome

This booklet will help you install *AgreementBuilder* quickly and easily. Inside you will find:

- Step-by-step instructions for installing *AgreementBuilder* on your personal computer (IBM PC or PC-compatible) and on your Apple Macintosh.
- A description of installed files and their locations.
- Instructions for converting the *AgreementBuilder* data files to your word processor's format.
- Troubleshooting tips to help you solve installation and file conversion problems.
- Directions on how to proceed after you have completed the installation and file conversions.

Before You Start

■ Check Your Package

Please check the contents of your *AgreementBuilder* package. It should contain the following items:

- *AgreementBuilder Reference Guide*.
- *AgreementBuilder Getting Started* (this booklet).
- The Software License Agreement envelope containing your *AgreementBuilder* disk.
- A 5.25-inch Disk Request Card—The *AgreementBuilder* data files are supplied on a 3.5-inch high-density disk. If this disk is not the correct size for your computer, use this card to order 5.25-inch disks.
- An *AgreementBuilder Product Registration Card*.

If any of these items is missing, please contact JIAN at 800-346-5426.

■ Make a Backup Copy

For your protection, make a backup copy of your *AgreementBuilder* disk. For more information on copying disks, please refer to your operating system user guide.

Manual Conventions

Here are a few notes about the typographic conventions used in this manual.

Key Names and Combinations

The names of keys on your computer keyboard are in bold print, and are enclosed in angle brackets <>. For example:

<Enter>, <Esc>, <PgUp>, <PgDn>

A plus sign (+) between key names means that you should press all of the specified keys at the same time. For example,

<Shift>+<F8>

means that you should press and hold down <Shift>, then press <F8>, then release both keys.

What You Type

Commands that you should type exactly as they appear are also shown in **bold** print, but without angle brackets. For example:

SETUP

Note: On PC-compatible computers, capitalization generally does not matter, so setup, Setup, and SETUP all would have the same meaning.

Menu Names and Menu Items

Menu *names* are shown just as they appear in the actual menu, with the first letter of each word in the menu name capitalized, for example:

From the Open menu, select...

Menu *items* (the individual selections on a menu) are shown in **bold** print, for example:

...choose **Open** from the File menu.

Most Windows and Macintosh applications also use *buttons* that you click on to make a selection. Button names also appear in **bold** print.

Getting Started: PCs

■ What's on the AgreementBuilder Disk

Your AgreementBuilder disk contains more than 100 text file templates that will help you develop agreements that are understandable, direct and to the point.

■ What You Need

To install and use AgreementBuilder you need the following equipment and software:

- Any IBM-compatible 286 PC or higher with
 - 1 MB RAM
 - 4 MB free hard disk space
 - 3.5-inch high-density floppy disk drive
 - Windows 3.1
- Word processing software

■ File Compatibility

The AgreementBuilder files are supplied in Microsoft Word 2.0 for Windows format, which can be read by most Windows-based word processors.

Installing **AgreementBuilder**

Follow the steps outlined below to install *AgreementBuilder* under Windows.

Note: If your hard disk drive is something other than C, and/or your floppy disk drive is something other than A, you should use the correct letter in place of C and/or A in the instructions below.

1. Make sure Windows is running on your computer.
2. Insert the *AgreementBuilder* Disk into your floppy disk drive.
3. From the Windows Program Manager, select **File**, then select **Run**.
4. In the Run window Command line, type **A:\SETUP** and click **OK**. In a few moments, the Welcome to JIAN! window displays. Click **OK** when you are ready to continue.
5. A new window appears, with **Install AgreementBuilder** selected. Click **OK** to continue the installation.
6. A window appears that explains the text file templates. Click **OK** when you are ready to continue.
7. The default installation directory is C:\AGREE. You may specify a different hard drive or directory if you prefer. Click **OK** to continue.

The Setup program installs the *AgreementBuilder* text file templates on your hard drive in the specified installation directory.

Note: Since *AgreementBuilder* is not a program, the setup program cannot create an *AgreementBuilder* Windows program group or icon. The *AgreementBuilder* files are simply installed on your hard drive in a directory named AGREE (or whatever directory name you specified during the setup procedure) and may now be accessed using your word processor.

10. Installation is now complete. The next two windows provide additional information about *AgreementBuilder*. Click **OK** when you have finished reading both windows to exit the setup program.

Congratulations! You have successfully installed *AgreementBuilder*. See page 5 for instructions on using *AgreementBuilder* with your word processor.

Word Processing and AgreementBuilder

Before you can begin to create your own agreements, you need to make certain that your word processor can use the *AgreementBuilder* files that you installed. This is done through a process which we refer to as conversion. The following pages detail this conversion process for many of the most popular Windows word processors.

Note: For the purposes of our files, convert and import mean the same thing—to change the *AgreementBuilder* files from their original format into your word processor's internal format. Your word processor may use either term.

■ AgreementBuilder Filenames

All of the *AgreementBuilder* text file templates are provided in Microsoft Word 2.0 for Windows format for use with most Windows-based word processors. The filenames are listed in the following table.

Document Name	PC Filename
Account for Collection Assignment	acctcoll.doc
Advertising Cooperative Agreement	adv-coop.doc
Agreement to Settle Disputed Account	set-disp.doc
Articles of Incorporation	articles.doc
Bailment Agreement	bailment.doc
Bill of Sale	billsale.doc
Business Assets Transfer Agreement	busasset.doc
Buy-Sell Agreement	buy-sell.doc
Bylaws	bylaws.doc
Co-Marketing Agreement	comarket.doc
Collection Agent Appointment Agreement	colagent.doc
Commercial Lease	comlease.doc
Commercial Software Licensing Agreement	comswlic.doc
Commercial Sublease	comsubls.doc
Consign Merchandise Agreement	consignm.doc
Consulting Agreement	consult.doc
Contract Assignment	contassn.doc
Contract to Sell Goods	sellgood.doc
Copyright Assignment	copyassn.doc
Credit Agreement	credit.doc
Custom Non-Software Design/Development Agreement	cusnonsw.doc
Custom Software Development Agreement	cusswdev.doc
Dealer Resale Agreement	dealer.doc
Debt Assignment	debtassn.doc
Employee Non-Disclosure Agreement	empnonds.doc

Getting Started: PCs

Document Name	PC Filename
Employee Stock Bonus Plan and Agreement	empstock.doc
Employee's Acknowledgement of Employer's Rights in Work Product	emp-ackn.doc
Employment Agreement	employ1.doc
Employment Agreement (Short Version)	employ2.doc
Employment Continuation Agreement	emp-cont.doc
Employment Termination and Severance Agreement	emp-term.doc
Equipment Lease	equipmls.doc
Equipment Purchase Agreement	equippur.doc
Exclusive Authorization to Represent Buyer	repbuyer.doc
Exclusive Authorization to Represent Seller	repsteller.doc
Exclusive Distribution Agreement	exc-dist.doc
Extended Service Agreement	ext-serv.doc
Extension Agreement	extensn.doc
Finder for Sale of Business Agreement	findsale.doc
Finder's Fee (Lehman Formula) Agreement	find-fee.doc
Foreign Sales Representative Agreement	foreign.doc
General Licensing Agreement	gen-licn.doc
General Partnership Agreement	gen-part.doc
General Power of Attorney	poweratt.doc
General Release	gen-rels.doc
Hardware Maintenance Agreement	hw-maint.doc
Incentive Stock Option Plan and Agreement	stockopt.doc
Indemnity Agreement	indemnty.doc
Independent Contractor's Agreement	ind-cont.doc
International Distribution Agreement	intldist.doc
International Licensing Agreement	intllicn.doc
Lease Assignment by Lessee	lessee.doc
Lease Assignment by Lessor	lessor.doc
Lease Guaranty	leasegty.doc
Lease Modification Agreement	leasemod.doc
Legal Services Contingency Fee Agreement	legalcon.doc
Legal Services Fee Agreement	legalfee.doc
Legal Services Retainer Agreement	legalret.doc
Letter of Intent for Negotiation and Information Exchange	neg-info.doc
Letter of Intent for Sale of Business	sale-bus.doc
Letter of Intent to Sell Business Assets	sellasst.doc
Licensing Assignment for Sale and/or Manufacture of Patented Invention	pat-licn.doc
Limited Partnership Agreement	ltd-part.doc
Mailing List Exchange Agreement	mailexch.doc

Document Name	PC Filename
Mailing List Rental Agreement	mailrent.doc
Manufacturer's Representative Agreement	manu-rep.doc
Mutual Release	mutlrels.doc
Mutual Termination of Contract	multerm.doc
Non-Delinquent Accounts Receivable Assignment	acctrecv.doc
Non-Disclosure Agreement	non-disc.doc
Non-Disclosure and Non-Circumvention Agreement	non-circ.doc
Non-Exclusive Distribution Agreement	nondist1.doc
Non-Exclusive Distribution Agreement (Short Version)	nondist2.doc
OEM/Remarketing Agreement	oem-rmkt.doc
Partnership Dissolution Agreement	part-dis.doc
Patent Assignment	pat-assn.doc
Personal Credit Guaranty	per-cred.doc
Personal Injury Release	per-inju.doc
Personal Loan Guaranty	perloan1.doc
Personal Loan Guaranty (Short Version)	perloan2.doc
Prenuptial Agreement (Version 1)	prenupt1.doc
Prenuptial Agreement (Version 2)	prenupt2.doc
Product Licensing Agreement	prodlicn.doc
Promissory Note	promnote.doc
Residential Lease	reslease.doc
Residential Sublease	ressubls.doc
Revocation of Power of Attorney	revpower.doc
Sales Agreement	sales.doc
Sales Representative Agreement	salesrep.doc
Salesperson Commission Only Agreement	salecomm.doc
Salesperson Master Commission Agreement	salemast.doc
Security Agreement	security.doc
Service Agreement	service.doc
Software Maintenance Agreement	sw-maint.doc
Software Manufacturing and Distribution Agreement	swmfdis.doc
Stock Redemption Agreement	stockred.doc
Sublease	sublease.doc
Sublease Guaranty	sublsgty.doc
Technology Assignment	techassn.doc
Technology Evaluation Licensing Agreement	techeval.doc
Trademark Assignment	tradassn.doc
Trademark Licensing Agreement	tradlicn.doc
Work for Hire Agreement	workhire.doc

■ Using Your Word Processor with *AgreementBuilder*

AgreementBuilder files are data files (templates) that are designed to be used with your word processor. To use the *AgreementBuilder* templates, follow these steps.

1. Start your word processor.
2. Open the *AgreementBuilder* files from within your word processor.
(Instructions for opening the *AgreementBuilder* templates into a variety of word processors are provided on the following pages.)
3. Use your word processor as you normally would to edit, save, and print each document that you need, just as you would for documents you create yourself.

Word Processor File Conversions

On the following pages, we've included specific instructions for importing the *AgreementBuilder* files into the following Windows word processors:

Ami Pro for Windows
ClarisWorks for Windows
Microsoft Word for Windows
Microsoft Works for Windows
WordPerfect for Windows

If your word processor is not listed above, look in the index of your word processor's manual under "Importing," "Converting Files," "Opening Files from Other Applications," or something similar, and import the *AgreementBuilder* files into your word processor according to those instructions.

Note: When it is necessary to convert text files for use by your word processor, the file conversion process only needs to be done once per file. After you've converted and saved a file the first time, you can then retrieve (or open) it as you normally would any file you edit.

■ Ami Pro 3.0 for Windows

File Format Installed: Word 2.0 for Windows

Follow these steps to convert the *AgreementBuilder* files from Word 2.0 for Windows format to Ami Pro format all at once, using a macro provided by Ami Pro.

1. Start Ami Pro.
2. From the Tools menu, select **Macros**, then select **Playback...**. The Play Macro window appears.
3. In the Macros: scroll box, select **convert.smm**, then click **OK**. The Batch Convert window appears.
4. In the Convert from: scroll box, click on the down arrow to scroll down through the list, and select **Word 2.0 for Windows**.
5. In the Directories scroll box, double-click on [...] until the Directory line reads C:\. Then, double-click on [AGREE].

The File name: box changes to *.DOC, and the Files: box now displays all of the *AgreementBuilder* .DOC files. The Files to convert: line (located at the bottom of the Batch Convert window) should read All *.DOC files in directory.

6. Click **OK** to start the conversion process.
7. As Ami Pro starts to convert the file, it displays the Import Options window. Select the **Apply Styles** button, then click **OK**.

Ami Pro converts the file, displays it on the screen, and then saves the file in Ami Pro's internal format.

8. Repeat Step 7 for every file being converted.

When all of the files have been processed, the Ami Pro Macro window opens, and tells you that the conversion was successfully completed. All of your *AgreementBuilder* files are now in Ami Pro format (with a .SAM extension), and are located in your *AgreementBuilder* directory (C:\AGREE). You can retrieve, edit, save, and print them as you normally would any Ami Pro document.

To retrieve one of the newly converted files, select File, then select Open. In the Directories scroll box, double-click on [...] until the Directory line reads C:\. Then, double-click on [AGREE]. From the list of files that appears in the Documents column, double-click on the name of the file that you want to edit.

■ Ami Pro 3.1 for Windows

File Format Installed: Word 2.0 for Windows

Follow these steps to convert the *AgreementBuilder* files from Word 2.0 for Windows format to Ami Pro format.

Note: Only use these instructions if you installed Ami Pro 3.1 as a new product versus an upgrade. If the Ami Pro 3.1 on your computer was installed as an upgrade to a previous version of Ami Pro (such as 2.0 or 3.0), you can use the conversion instructions provided for Ami Pro 3.0.

1. Start Ami Pro.
2. Select **File**, then select **Open**.
3. In the List files of type: scroll box, click on the down arrow to scroll down through the list, and select **Word for Windows 2.0**.
4. In the Directories scroll box, double-click on [...] until the Directory line reads **C:**. Then, double-click on **[AGREE]**.

The File name: box changes to ***.DOC**, and the Files: box now displays all of the *AgreementBuilder* .DOC files.

5. Select a file from the Files: box, then click **OK** to open the file and start the conversion process.
6. As Ami Pro starts to convert the file, it displays the Import Options window. Select the **Apply Styles** button, then click **OK**.

Ami Pro converts and opens the file, and displays it on the screen

7. Repeat Steps 1-7 for every file you want to open.
8. Select **File**, then **Save**.
9. In the File Name: box, type in the name of the file, then click **OK** to save the converted file.

Ami Pro saves your converted file in Ami Pro format (with a **.SAM** extension). The file is located in your *AgreementBuilder* directory (**C:\AGREE**). You can retrieve, edit, save, and print it as you normally would any Ami Pro document.

To retrieve the newly converted file, select **File**, then select **Open**. In the Directories scroll box, double-click on [...] until the Directory line reads **C:**. Then, double-click on **[AGREE]**. From the list of files that appears in the Documents column, double-click on the name of the file that you want to edit.

■ ClarisWorks 1.0, 3.0 for Windows

File Format Installed: Word 2.0 for Windows

Follow these steps to convert the *AgreementBuilder* files from Word 2.0 for Windows format to ClarisWorks for Windows format.

1. Start ClarisWorks for Windows.
2. Select **File** then select **Open**.
3. From the Open menu, select **C:** from the Directories listing, then select **AGREE**.
4. Click on the button under Import Options to display the list of available import options.
5. Click on the **Word Processing** button.
6. In the List Files of Type box, click on the down arrow key to scroll through the options and select **Microsoft Word for Windows** (for ClarisWorks 1.0 users) or **Word for Windows 2.x** (for ClarisWorks 3.0 users). The File Name: scroll box now displays a list of the *AgreementBuilder*.DOC files.
7. Select the file you wish to open (for example, PROMNOTE.DOC), then select **OK**. ClarisWorks for Windows converts the file into its internal format and displays it on screen. Note that ClarisWorks has added (converted) to the filename.
8. Select **File**, then select **Save As**. Make sure the Save File As Type option is set to ClarisWorks Files (*.CWK).
9. Change the filename extension from .DOC to **.CWK**, then press **<Enter>**.

3.0 Users Note: You can eliminate Step 9 since ClarisWorks performs this step for you automatically.

10. Select **File**, then select **Close**.

11. Repeat Steps 2 through 10 for each *AgreementBuilder*.DOC file that you want to use.

After you have converted an *AgreementBuilder* file, you can retrieve, edit, save, and print it as you normally would any ClarisWorks document.

To retrieve a newly converted *AgreementBuilder*.CWK file, follow Steps 2 and 3 above. Make sure the List Files of Type: box displays ClarisWorks files (*.CWK), then select the *AgreementBuilder*.CWK file with which you want to work from the File Name: scroll box.

■ Microsoft Word 2.0, 6.0 for Windows

File Format Installed: Word 2.0 for Windows

Since the *AgreementBuilder* files are supplied in Microsoft Word for Windows format, the files do not need to be converted. You can open, edit, save, and print them as you normally would any Microsoft Word for Windows document.

Follow these steps to open any of the *AgreementBuilder*.DOC files.

1. Start Microsoft Word for Windows.
2. Select **File** then select **Open**.
3. From the Open menu, select **C:** from the Directories listing, then select **AGREE**.
4. From the list of files that appears in the Files: box, select the .DOC file that you want to open, for example, PROMNOTE.DOC.

Word opens the file and displays it on your computer screen.

Repeat the above steps for each file you wish to edit. When you are finished editing a particular file, select **File→Save** to save your edits, then select **File→Close** to close the file.

■ Microsoft Works 2.0, 3.0 for Windows

File Format Installed: Word 2.0 for Windows

Follow these steps to convert the *AgreementBuilder* files from Word 2.0 for Windows format to Microsoft Works for Windows format.

1. Start Microsoft Works for Windows.
2. Select **File** then select **Open Existing File**.

Version 3.0 Users: Click the **Open Existing File** icon on the opening window.

3. From the Open menu, select C:\ from the Directories listing, then select **AGREE**.
4. Under List Files of Type at the bottom left-hand corner of the window, click on the down arrow key to scroll through the options and select Word 2.0 for Windows. The File Name: scroll box now displays a list of the *AgreementBuilder*.DOC files.
5. Select the file you wish to open, for example, PROMNOTE.DOC, then select **OK**. Works for Windows converts the file into its internal format and displays it on screen.
6. Select **File**, then select **Save As**. Make sure the Save File As Type option is set to Works WP.
7. Change the filename extension from .DOC to .WPS, then press **<Enter>**.
8. Select **File**, then select **Close**.
9. Repeat Steps 2 through 8 for each *AgreementBuilder*.DOC file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you normally would any Microsoft Works document.

To retrieve one of the newly converted *AgreementBuilder*.WPS files, follow Steps 2 and 3 above. Make sure the List Files of Type: box displays Works WP (*.WPS), then select the *AgreementBuilder*.WPS file with which you want to work from the File Name: scroll box.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you normally would any Professional Write document. To retrieve one of the newly converted files, follow Steps 2 through 4 above, then select the name of the file with which you want to work.

■ WordPerfect 6.0 for Windows

File Format Installed: Word 2.0 for Windows

Follow these steps to convert the *AgreementBuilder* files from Word 2.0 for Windows format to WordPerfect 6.0 for Windows format.

1. Start WordPerfect for Windows.
2. Select **File** then **Open**.
3. In the Directories: box on the Open File menu, select either **C:**, then select **AGREE**. The Files box lists the *AgreementBuilder* .DOC files.

Note: If the Directories box does not appear, deselect the Quick List option near the bottom center of the Open File window; the Directories box should now replace the Quick List box on your screen.

4. Select the file you wish to retrieve, for example, PROMNOTE.DOC, and click **OK**.
5. A Convert File Format box appears, with MS Word for Windows 2.0, 2.0a or 2.0b selected. Click **OK**.

WordPerfect for Windows displays a Conversion in Progress message, then opens the file and displays it on screen.

6. Select **File**, then select **Save**. The Save Format window opens, asking you in what format it should save the file. WordPerfect is selected as the default.
7. Change the filename extension from .DOC to .WPD, then click **OK** to save the file in WordPerfect for Windows format.
8. Select **File**, then select **Close**.
9. Repeat Steps 2 through 7 for each *AgreementBuilder* .DOC file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you normally would any WordPerfect for Windows document.

To retrieve one of the newly converted files, follow Steps 2 through 4 above, but select the .WPD file instead of the .DOC file.

Mailing List Rental
Manufacturer's Representative
Mutual Release
Mutual Termination of Contract
Non-Delinquent Accts Receivable
Non-Disclosure
Non-Circumvention
Non-Exclusive Distribution1
Non-Exclusive Distribution2
OEM/Remarketing
Partnership Dissolution
Patent Assignment
Personal Credit Guaranty
Personal Injury Release
Personal Loan Guaranty 1
Personal Loan Guaranty 2
Prenuptial 1
Prenuptial 2
Product License
Promissory Note
Residential Lease
Residential Sublease
Revocation of Power of Attorney
Sales
Sales Representative
Salesperson Commission Only
Salesperson Master Commission
Security
Service
Software Maintenance
Software Mfg/Distribution
Stock Redemption
Sublease
Sublease Guaranty
Technology Assignment
Technology Evaluation License
Trademark Assignment
Trademark License
Work for Hire Agreement

■ Using Your Word Processor with *AgreementBuilder*

AgreementBuilder RTF files are data files (templates) that are designed to be used with your word processor. To use the *AgreementBuilder* templates, follow these steps:

1. Start your word processing program.
2. Open the *AgreementBuilder* files from within your word processor.
(Instructions for opening the *AgreementBuilder* templates into specific word processors are provided on the following pages.)
3. Use your word processor as you normally would to edit, save, and print each document that you need, just as you would for documents you create yourself.

Word Processor File Conversions

On the pages that follow, we have included detailed instructions for importing the *AgreementBuilder* files into the following Macintosh word processors:

ClarisWorks

MacWrite II

MacWrite Pro

Microsoft Word

Microsoft Works

WordPerfect

WriteNow

If your word processor is not listed above, look in the index of your word processor's manual under "Importing," "RTF," "Rich Text Format," "Merging Text Files," "Converting Files," "Opening Files from Other Applications," or something similar, and open the RTF files into your word processor according to those instructions.

Word Processing and AgreementBuilder

Before you can begin to create your own agreements, you need to make certain that your word processor can use the *AgreementBuilder* files that you installed. This is done through a process which we refer to as conversion. The following pages detail this conversion process for many of the most popular Macintosh word processors.

Note: For the purposes of our files, convert and import mean the same thing—to change the *AgreementBuilder* files from their original format into your word processor's internal format. Your word processor may use either term.

■ **AgreementBuilder Filenames**

All of the *AgreementBuilder* word processing files are provided in RTF format for use with Macintosh computers. The filenames are as follows:

Account for Collection
Advertising Cooperative
(Agreement to) Settle Disputed Account
Articles of Incorporation
Bailment
Bill of Sale
Business Assets Transfer
Buy-Sell
Bylaws
Co-Marketing
Collection Agent Appointment
Commercial Lease
Commercial Software Licensing
Commercial Sublease
Consign Merchandise
Consulting Agreement
Contract Assignment
Contract to Sell Goods
Copyright Assignment
Credit
Custom Non-Software Design/Dev
Custom Software Development
Dealer Resale
Debt
Employee Non-Disclosure

Employee Stock Bonus
Employee's Acknowledgement
Employment1
Employment2
Employment Continuation
Employment Termination
Equipment Lease
Equipment Purchase
(Exclusive Authorization to) Represent Buyer
(Exclusive Authorization to) Represent Seller
Exclusive Distribution
Extended Service
Extension Agreement
Finder for Sale of Business
Finder's Fee
Foreign Sales Representative
General Licensing
General Partnership
General Power of Attorney
General Release
Hardware Maintenance
Incentive Stock Option
Indemnity
Independent Contractor's
International Distribution
International Licensing
Lease Assignment by Lessee
Lease Assignment by Lessor
Lease Guaranty
Lease Modification
Legal Services Contingency Fee
Legal Services Fee
Legal Services Retainer
(Letter of Intent for) Negotiation/Information Exchange
(Letter of Intent for) Sale of Business
(Letter of Intent to) Sell Business Assets
License-Sale/Manufacture Patent
Limited Partnership
Mailing List Exchange

Getting Started: Apple Macintosh

■ What's on the AgreementBuilder Disk

Your AgreementBuilder disk contains more than 100 text file templates that will help you develop agreements that are understandable, direct and to the point.

■ What You Need

To install and use AgreementBuilder, you need the following equipment and software:

- Any Apple Macintosh Computer with
 - System 6.x or later
 - 1 MB RAM
 - 4 MB free hard disk space
 - A 3.5-inch high-density floppy disk drive
- Word processing software

■ File Compatibility

The AgreementBuilder files are supplied in Rich Text Format (RTF)—a Microsoft adapted file format that is used for transferring formatted text documents between applications and between platforms. Virtually all Macintosh word processing applications can read RTF files.

Installing **AgreementBuilder**

Follow the steps outlined below to install *AgreementBuilder*.

1. Insert your *AgreementBuilder* disk into your Macintosh floppy drive, and if necessary, double-click on the disk to open it.
2. Double-click on the *AgreementBuilder* icon.
3. The *AgreementBuilder* window opens. Click **Continue**.
4. A new window opens which contains general information about *AgreementBuilder*. Click **Continue**.
5. The Install software into folder: box should read *AgreementBuilder* folder. If you want to use a name other than *AgreementBuilder* for your folder, edit this name now. Click **Install**.
6. The Installing box appears, and counts off the files as it decompresses and installs them. When the process is complete, the Installation Was Successful window opens.
7. Click **Quit**.

A new *AgreementBuilder* folder on your hard disk drive now contains the *AgreementBuilder* files.

Congratulations! You have successfully installed *AgreementBuilder*. See the following pages for instructions on using *AgreementBuilder* with your word processor.

■ Microsoft Works 2.0

Follow these steps to open the *AgreementBuilder* RTF files using Microsoft Works 2.0.

1. Start Microsoft Works.
2. On the window that appears, click the **Word Processing icon**.
3. Click on **Import File** located near the bottom of the window.
4. Select **Macintosh HD** and click **Open**.
5. Select **AgreementBuilder** from the folders listed under Macintosh HD, and click **Open**.
6. From the list of files that appears, select the name of the file you want to open (for example, Promissory Note), then click **Open**.

Microsoft Works converts the *AgreementBuilder* RTF file into its internal format and displays it in a new untitled window.

Note: Please refer to page 34 under Technical Support if you have any difficulty opening the *AgreementBuilder* RTF files.

7. Select **File**, then select **Save**.
8. In the window that opens, change the filename from Untitled to the original filename. Make sure that **Normal** is selected. Then, click **Save**.
9. A Replace Existing? message appears. Click **Yes** to replace the RTF file with the converted Microsoft Works file. Microsoft Works saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
10. Select **File**, then select **Close**, to close the converted file.
11. Repeat Steps 2 through 10 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any Microsoft Works document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ Microsoft Works 3.0

Follow these steps to open the *AgreementBuilder* RTF files using Microsoft Works 3.0.

1. Start Microsoft Works.
2. Select **File**, then select **Open**.
3. A new window appears. Set Choose Type: to **Word Processor**.
4. Set File format to **RTF**.
5. Select **Macintosh HD** and click **Open**.
6. Select **AgreementBuilder** from the folders listed under Macintosh HD, and click **Open**.
7. From the list of files that appears, select the name of the file you want to open (for example, Promissory Note), then click **Open**.

Microsoft Works converts the *AgreementBuilder* RTF file into its internal format and displays it in a new untitled window.

Note: Please refer to page 34 under Technical Support if you have any difficulty opening the *AgreementBuilder* RTF files.

8. Select **File**, then select **Save**.
9. In the window that opens, change the filename from Untitled to the original filename, then, click **Save**.
10. A Replace Existing? message appears. Click **Yes** to replace the RTF file with the converted Microsoft Works file. Microsoft Works saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
11. Select **File**, then select **Close**, to close the converted file.
12. Repeat Steps 2 through 11 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any Microsoft Works document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ MacWrite Pro

Follow these steps to open the *AgreementBuilder* RTF files using MacWrite Pro.

1. Start MacWrite Pro.
2. Select **File**, then select **Open**.
3. In the Open Document window that appears, click **Desktop**. Then select **Macintosh HD** (or the name of your Macintosh hard drive, if you named it), and click **Open**.
4. Select **AgreementBuilder** from the list of folders listed under Macintosh HD, then click **Open**.
5. Make sure that Show is set to **All available**.
6. From the list that appears, select the name of the file you want to convert (for example, Promissory Note), then click **Open**.

The Converting: window is displayed. MacWrite Pro converts the *AgreementBuilder* RTF file into its internal format and displays it on screen.

Note: If the converting window says that it is converting from text, instead of converting from RTF, then the MacWrite Pro translator files are not installed on your hard drive. Refer to page 34 under Technical Support.

7. Select **File**, then select **Save**. A new window opens. Note that MacWrite Pro has added (*converted*) to the end of the filename. The Save As: box reads MacWrite Pro.
8. Click **Save**. MacWrite Pro saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
9. Select **File**, then select **Close**, to close the converted file.
10. Repeat Steps 2 through 9 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any MacWrite Pro document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ Microsoft Word 3.01 and Later

Follow these steps to open the *AgreementBuilder* RTF files using Microsoft Word.

1. Start Microsoft Word.
2. Select **File**, then select **Open**.
3. In the Select A Document window that appears, select **Macintosh HD**, then select **AgreementBuilder** from the list of folders that appears, and click **Open**.
4. From the list that appears, select the name of the file you want to open (for example, Promissory Note), then click **Open**.
5. If asked, click **Yes** in answer to Interpret RTF text?

The Converting: window is displayed. Microsoft Word converts the *AgreementBuilder* RTF file into its internal format and displays it in a new untitled window.

Note: Please refer to page 34 under Technical Support if you have any difficulty opening the *AgreementBuilder* RTF files.

6. Select **File**, then select **Save As**.
7. In the window that appears, type the name of your document in the Save Current Document as: box, then click **Save**. Microsoft Word saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.

Note: If you label the converted file with the same name as the original RTF file, a Replace Existing? message appears. Click **Yes** to replace the RTF file with the converted Microsoft Word file.

8. Select **File**, then select **Close**, to close the converted file.
9. Repeat Steps 2 through 8 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any Microsoft Word document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ ClarisWorks 1.0, 2.0, 2.1

Follow these steps to open the *AgreementBuilder* RTF files using ClarisWorks.

1. Start ClarisWorks.
2. On the New Document window, select **Word Processing**, then click **OK**.
3. Select **File**, then select **Open**.
4. In the window that appears, click **Desktop**. Then select **Macintosh HD** (or the name of your Macintosh hard drive, if you named it), and click **Open**.
5. Select **AgreementBuilder** from the list of folders under Macintosh HD, then click **Open**.
6. **ClarisWorks 1.0 Users:** To set your Import Options (located near the bottom right hand corner of the window), click the **key-shaped icon**. Select **Word Processor** from the list of import options that appears.

ClarisWorks 2.0, 2.1 Users: Make sure that the Document Type is set to **Word Processing**, and that the File Type is set to **RTF**.

7. From the list of files that appears, select the name of the file you want to convert (for example, Promissory Note), then click **Open**.

ClarisWorks converts the *AgreementBuilder* RTF file into its internal format and displays it on screen.

Note: Please refer to page 34 under Technical Support if you have any difficulty opening the *AgreementBuilder* RTF files.

8. Select **File**, then select **Save As**. The Save As: window opens. Note that ClarisWorks has added (*converted*) to the end of the filename. The Save As: box reads ClarisWorks.
9. Click **Save**. ClarisWorks saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
10. Select **File**, then select **Close**, to close the converted file.
11. Repeat Steps 2 through 10 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any ClarisWorks document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ MacWrite II

Follow these steps to open the *AgreementBuilder* RTF files using MacWrite II.

1. Start MacWrite II.
2. Select **File**, then select **Open**.
3. In the Open Document window that appears, click **Desktop**. Then select **Macintosh HD** (or the name of your Macintosh hard drive, if you named it), and click **Open**.
4. Select **AgreementBuilder** from the list of folders listed under Macintosh HD, then click **Open**.
5. Make sure that Show is set to **All available**.
6. From the list that appears, select the name of the file you want to convert (for example, Promissory Note), then click **Open**.

The Converting: window is displayed. MacWrite II converts the *AgreementBuilder* RTF file into its internal format and displays it on screen.

Note: Please refer to page 34 under Technical Support if you have any difficulty opening the *AgreementBuilder* RTF files.

7. Select **File**, then select **Save**. A new window opens. Note that MacWrite II has added (*converted*) to the end of the filename. The Save As: box reads MacWrite II.
8. Click **Save**. MacWrite II saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
9. Select **File**, then select **Close**, to close the converted file.
10. Repeat Steps 2 through 9 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any MacWrite II document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ WordPerfect 1.0, 1.05

Follow these steps to open the *AgreementBuilder* RTF files using WordPerfect.

1. Start WordPerfect
2. Select **File**, then select **File Management**.
3. In the window that appears, select **Macintosh HD** (or the name of your Macintosh hard drive, if you named it), and click **Open**.
4. Select **AgreementBuilder** from the list of folders listed under Macintosh HD, then click **Open**.
5. From the list that appears, select the name of the file you want to convert (for example, Promissory Note), then click **Open**.

WordPerfect converts the *AgreementBuilder* RTF file into its internal format and displays it in a new untitled window.

6. Select **File**, then select **Save**. In the window that opens, change the filename from Untitled to the original filename, then, click **Save**.
7. A Replace Existing? message appears. Click **Yes** to replace the RTF file with the converted WordPerfect file. WordPerfect saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
8. Select **File**, then select **Close**, to close the converted file.
9. Repeat Steps 2 through 8 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any WordPerfect document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ WordPerfect 2.0, 2.01

Follow these steps to open the *AgreementBuilder* RTF files using WordPerfect.

1. Start WordPerfect
2. Select **File**, then select **Open**.
3. In the window that appears, select **Macintosh HD** (or the name of your Macintosh hard drive, if you named it), and click **Open**.
4. Select **AgreementBuilder** from the list of folders listed under Macintosh HD, then click **Open**.
5. From the list that appears, select the name of the file you want to convert (for example, Promissory Note), then click **Open**.

WordPerfect converts the *AgreementBuilder* RTF file into its internal format and displays it in a new untitled window.

Note: If WordPerfect does not convert the file correctly, you may not have included the conversion utility RTF option in your Private Library when you first installed WordPerfect. Refer to your WordPerfect manual for instructions on installing the conversion utility, or contact WordPerfect technical support.

6. Select **File**, then select **Save**. In the window that opens, change the filename from Untitled to the original filename, then click **Save**.
7. A Replace Existing? message appears. Click **Yes** to replace the RTF file with the converted WordPerfect file. WordPerfect saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
8. Select **File**, then select **Close**, to close the converted file.
9. Repeat Steps 2 through 8 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any WordPerfect document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

■ WriteNow 2.0 and Later

Follow these steps to open the *AgreementBuilder* RTF files using WriteNow.

1. Start WriteNow.
2. Select **File**, then select **Open**.
3. Under Type of Document to Open:, click on the down arrow key until **RTF (Microsoft Interchange)** appears, then select it.
4. Click **Desktop**. Then select **Macintosh HD** (or the name of your Macintosh hard drive, if you named it), and click **Open**.
5. Select **AgreementBuilder** from the list of folders listed under Macintosh HD, then click **Open**.
6. From the list that appears, select the name of the file you want to convert (for example, Promissory Note), then click **Open**.

WriteNow converts the *AgreementBuilder* RTF file into its internal format and displays it on screen.

Note: If WriteNow is not allowing you to open the *AgreementBuilder* files, it may be because the Filters Folder was not copied from original WriteNow Disk 2 during the installation of your WriteNow application. Copy the Filters Folder from the WriteNow Disk 2 into your System folder on your Macintosh hard drive to enable the transparent file conversion process. If you can't locate your Filters folder, contact WriteNow.

7. Select **File**, then select **Save**.
8. In the window that appears, type the name of your document in the Save this Document as: box.
9. Make sure that **WriteNow** appears in the Save as Type: box, then click **Save**. WriteNow saves the converted file in the *AgreementBuilder* folder on your Macintosh HD.
10. Select **File**, then select **Close**, to close the converted file.
11. Repeat Steps 1 through 10 for each *AgreementBuilder* file.

After you have converted all of the *AgreementBuilder* files, you can retrieve, edit, save, and print them as you would any WriteNow document. To retrieve one of the newly converted files, select the *AgreementBuilder* folder from your Macintosh hard drive and open it, then double-click on the converted filename.

Getting Started: Apple Macintosh

Technical Support

Frequently Asked Questions

The following pages list questions frequently asked by our customers. The first set of questions deals with issues that are common to all users. The second set of questions deals specifically with PC-related issues. The third set of questions deals with Macintosh-related issues. If you are experiencing any difficulty with installing, converting, or using *AgreementBuilder*, please read through these pages. The answers listed may provide the assistance you need to begin working with *AgreementBuilder*.

■ General Questions

Why can't I start *AgreementBuilder*?

AgreementBuilder is not a program in itself. It is a set of data files (or templates) that are designed to be accessed and used through your word processor.

Does each *AgreementBuilder* file need to be converted separately?

This depends on your word processor. Some word processors provide a utility that allows you to convert multiple files at once. Other word processors allow you to convert only one file at a time. In either case, if the files need to be converted at all, the conversion process needs to be done only the first time you call up the file(s).

If your word processor is Microsoft Word 2.0 for Windows, then you don't need to convert the files.

Note: For the purposes of our files, convert and import mean the same thing—to change the *AgreementBuilder* files from their original format into your word processor's internal format. Your word processor may use either term.

How can I get a complete print-out of the documents to start editing from?

Due to the quantity of agreements included with AgreementBuilder, we were not able to include a printout of each of the templates in the reference guide.

If you want to print out a copy of the files before you start working with them, then we suggest you do so during the file conversion process. Since printing is a function of your word processor, you can print a file immediately after you have retrieved and saved it (and before you retrieve the next file). Check the index or table of contents in your word processor's manual under "Printing" for information on how to print a file.

Why can't I print the AgreementBuilder files?

Printing is a function of your word processor, and the AgreementBuilder files must be printed using your word processor's printing capabilities. If you are experiencing difficulty printing from within your word processor, check the following things:

1. If you cannot print anything at all, then you probably have a hardware problem. Check your cabling, make sure your printer is plugged in and turned on, and try again. If you still cannot print, contact your local computer "expert" or computer store for assistance.
2. If you cannot print the AgreementBuilder documents, but you can print other documents that you have worked on in the past, then check your word processor's print options for the AgreementBuilder documents. Look in your word processor's manual under "Print," "Printing," "Printer," "Print Options," "Page Formatting," "Page Breaks," "Margins," "Page Length," or something similar, make any necessary adjustments, then try to print the AgreementBuilder document(s) again.

Why don't the document files I print look like the sample file that is printed in the AgreementBuilder Reference Guide?

The way your documents look, both on the screen and on paper, is a function of your word processor, not of AgreementBuilder. If you want to change the way your documents look when you print them, then you need to use your word processor to adjust your margins, page length, or font, or some combination of these.

■ PC Questions

I can't find the files I installed from within my word processor. Where are the AgreementBuilder files located?

From within Windows, execute your File Manager (usually found within the Main program group). Look for a folder labeled AGREE. Double-click on the folder to open it and display the list of files it contains.

There should be 103 files listed.

If none (or only some) of the files are listed on your screen, then you need to reinstall *AgreementBuilder*. Follow the installation instructions on pages 4 of this booklet, then repeat the steps above to verify that all of the files were installed.

If all of the files are listed, then you need to change your word processor's working directory. Most word processors look for files in their default (or start-up) directory. Look in the index of your word processor's manual under "Changing Directories," "Specifying Directories," "Changing Paths," "Retrieving Files," or something similar for information on how to change the directory from which your word processor will retrieve files.

Instructions for changing directories for some word processors are included in the "Word Processor File Conversions" that begin on page 8.

■ Apple Macintosh Questions

Why can't I import the RTF files into my word processor?

If your word processor:

1. Will not open the *AgreementBuilder* RTF files at all, or
2. Displays a file on screen that looks like rows of code or symbols

And you are using a **Claris** application (for example, ClarisWorks, MacWrite), then you do not have the ClarisWorks Xtnd System and/or the Claris Works Translators installed on your Macintosh hard drive (usually in either your Claris folder or in your System folder). Refer to your word processor's manual for instructions on how to install the Claris Xtnd system.

If you are using **Microsoft Works**, then you do not have the RTF conversion file (normally found inside the Conversions folder, which is located in the Tools folder inside of your Microsoft Works folder) installed on your Macintosh hard drive. Refer to your word processor's manual for instructions on how to add the Tools and/or Conversions folder(s) to your Microsoft Works folder.

If you are using **Microsoft Word**, then you do not have the RTF converter (normally found inside of the Word Commands folder in your Microsoft Word folder) installed on your Macintosh hard drive. Exit Word, and install the converter using the Installer on your Microsoft Word disks. Then, restart Microsoft Word.

I double-clicked on one of my *AgreementBuilder* files, but it won't open. What's wrong?

If you get error messages similar to:

File cannot be opened. Application busy or missing.

The document could not be opened, because the application program that created it could not be found.

Then, you double-clicked on a file and the application that runs that file isn't available or couldn't be found on your system. For example, this can occur if you select (double-click) an RTF document and you use WriteNow as your word processor.

To correct this problem, start your word processor first and then select the *AgreementBuilder* file you want to open. Most word processors can automatically convert the RTF file into their own format.

Note: Your application may automatically open an empty file upon being started. Close the empty file, then open an *AgreementBuilder* file.

Refer to the “Word Processor File Conversions” instructions on page 20 of this booklet for additional instructions on using the *AgreementBuilder* files with Macintosh word processors.

The menu item I want to select is gray (instead of black). Why can't I select it?

This problem has a variety of causes. Select Cancel and start the process over. Be careful to go through the steps slowly, and don't double-click when instructed to single-click.

Third-Party Software

For your convenience, provided below is a list of the technical support phone numbers for the word processing programs and companies mentioned in this booklet.

Ami Pro (Lotus): 508-988-2500

ClarisWorks for Macintosh: 408-727-9054

ClarisWorks for Windows: 408-727-9004

MacWrite II, MacWrite Pro (Claris): 408-727-9054

Microsoft Windows: 206-637-7098

Microsoft Word for Macintosh: 206-635-7200

Microsoft Word for Windows: 206-637-7098

Microsoft Works for Macintosh: 206-635-7160

Microsoft Works for Windows: 206-635-7130

WordPerfect (Macintosh): 800-336-3614

WordPerfect for Windows: 800-228-1029

WriteNow: 404-428-0008

For More Assistance

JIAN Product Support Specialists can assist you with any problems related to installing or using the *AgreementBuilder* templates. Our phone number is 415-254-5600, extension 120. Support is available from 9:00 a.m. to 5:00 p.m. Pacific Time, Monday through Friday, excluding holidays.

Before You Call

1. Please be sure that you followed the *AgreementBuilder* installation instructions for your computer and word processor.
2. Double-check the "Frequently Asked Questions" at the beginning of this chapter. We may have already addressed your problem or question.

When You Call

Should you need support from JIAN to make the most effective use of *AgreementBuilder*, please have the following information available when you call:

1. Your *AgreementBuilder* serial number. This number is printed on the back of your *AgreementBuilder* disk **label**.
2. The make and model of your computer.
3. Your operating system software and version number (for example, PC-DOS 5.0, Windows 3.1, Macintosh System 7).
4. The name and version number of your word processor (for example, Microsoft Word for Windows 2.0).
5. A list of the error messages, if any, that you received when trying to install or open the *AgreementBuilder* files.

When you call, please be at your computer and ready to work with *AgreementBuilder*. Sometimes it may be necessary for you to leave a voice-mail message. If so, one of our Product Support Specialists will return your call as soon as possible.

The Next Step

Now that you are finished installing and converting your *AgreementBuilder* files, you are ready to create your own agreements.

Please remember that the materials in *AgreementBuilder* are intended only to provide guidelines to you, and to act as a foundation for further planning, editing, and customizing to fit your specific requirements.

■ **AgreementBuilder Reference Guide**

The *AgreementBuilder Reference Guide* provides detailed instructions on how to use *AgreementBuilder*. It discusses numerous topics related to contracts, including a primer on contract law. The reference guide also provides descriptions of all of the templates, including what the agreement is, why and when you should use it, how you should use it, who should use it, and other important tips.

Use the *AgreementBuilder Reference Guide* to help you decide which of the *AgreementBuilder* templates you need to further develop your business.

In addition, we suggest that you have a qualified attorney review any agreement before you sign it (see “Working with Your Attorney” in Section 1 of the reference guide) to ensure that you achieve the best results for your business. Also, please read the following “Important Notice” regarding use of the *AgreementBuilder* documents.

■ Customizing Your Agreement Materials

Based on the suggestions provided in the *AgreementBuilder Reference Guide*, you should then use your word processor to customize the *AgreementBuilder* templates. Instructions for doing so are provided in “Using the Templates” in Section 1 of the reference guide.

■ Important Notice!

Each of the agreements included in *AgreementBuilder* are intended to be illustrations only of the form of agreement that might apply in particular types of transactions. These agreements are not meant to be, nor do they constitute, legal or business advice, and the authors, editors and publishers (collectively referred to as the “**publishers**”) of these materials disclaim all warranties, representations, and responsibility for your use and reliance on these materials in any form. You explicitly understand and agree to each of the following:

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The Next Step







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